

Board of Education Retreat

December 5, 2018



Team Norms



- Honor Time- No Sidebars, Technology Aligned to Meeting Purpose, Start and End on Time
- Act as a Collective Body- Honor Confidentiality
- Check for Understanding, Surface Assumptions
- Share Divergent Views- Value as a Learning Opportunity
- Celebrate Successes and Each Other's Contributions
- Presume positive intent
- No personal attacks

Agenda

Item
Superintendent Framing
Understanding Current Context
Long Term Charter Lease Potential Criteria
Asset Management Timeline
Closing

Community of Schools Grounding in our Mission and Vision

Today's Outcomes

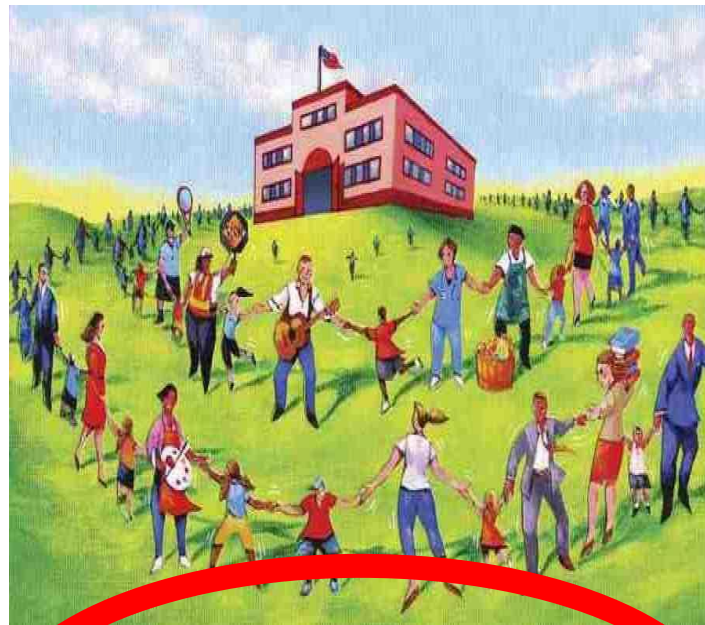


- To discuss potential criteria for long term leases to charters and get feedback from the board
- To have a common understanding of the next steps for all aspects of our Asset Management work this year

Our Vision And Mission Ground Us

Vision: All OUSD students will find joy in their academic learning experience while graduating with the skills to ensure they are caring, competent, fully-informed, critical thinkers who are prepared for college, career, and community success.

Mission: To become a **Full Service Community District** focused on high academic achievement while serving the whole child, eliminating inequity, and providing each child with excellent teachers, every day.



Key Principles: Quality, Equity, Access and Fiscal Sustainability

Community of Schools Policy (BP 6006)

A City Wide Plan grounded in policy: Asset Management, Charter Authorization, Enrollment, Equity, Results Based Budgeting, School Governance, and Quality School Development

A	Facilities	Best leverage vacant, underutilized, and surplus properties and utilize facility use agreements to strategically engage all Oakland public schools-district or charter; identify high quality options for academic programs
B	Enrollment & Transportation	Work with all Oakland public schools district or charter - to better articulate feeder patterns across Oakland to ensure more predictability for families.
C	Charter Authorization	Strengthen our role in oversight and accountability to ensure that all charter schools operating in Oakland are providing a high quality education and working to address inequities.
D	Access to Equitable & Quality Education for all	Share best practices across all Oakland public schools , (e.g., professional development, recruitment and retention of educators) that improve equitable educational access for all Oakland students.
E	Defined Autonomies	Best support continued innovation within OUSD schools and accelerate the number of high-quality school options within OUSD

Community of Schools: A Citywide Plan

5 Year Citywide Map



Blueprint for Quality Schools

Approve Cohort 2 in **May**



Quality School Standards & Defined Autonomies

Update existing guidance documents by **June**



Facilities Assets-Surplus Property

7-11 Committee to declare surplus property by **June**



Facilities Master Plan

Update facilities data and plan for portable removal by **June**



Charter Partnerships

Identify Long Term Lease Criteria by **December**



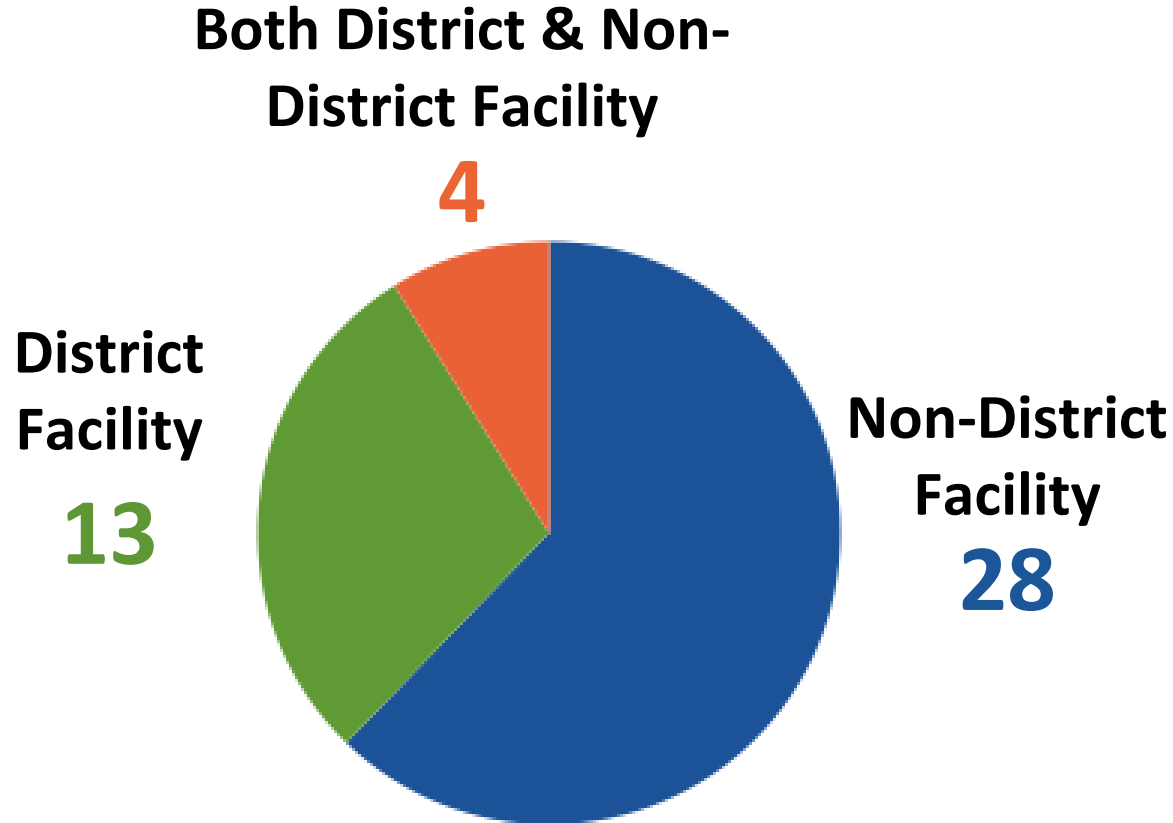
Enrollment/Feeder Patterns

Identify feeder patterns and enrollment plan in **2019-20**

An Interconnected Comprehensive Strategy

Current Context: Charters in District Facilities

Charter School Facilities - 2018-19



Charters in District Facilities - 2018-19

District Facility Only

1. Achieve Academy
2. American Indian Public High
3. ASCEND*
4. Aspire Berkley Maynard
5. Bay Area Technology
6. Community School for Creative Education (ACOE)
7. Cox Academy* (ACOE)
8. Francophone (2 sites)
9. KIPP Bridge
10. Lazear Academy* (ACOE)
11. Learning Without Limits*
12. LPS Oakland R & D
13. Roses in Concrete

Both District & Non-District Facility

1. American Indian Public Charter II
2. East Bay Innovation Academy
3. Oakland Military Institute
4. Urban Montessori (ACOE)

** Conversion Charters*

Charters in District Facilities - Legal Context

Three sources of facilities arrangements with charters:

1. Prop. 51 Long Term Agreements
2. Prop. 39
3. In-Lieu of Prop. 39 Long-Term Agreements

The district is not required to provide facilities for an approved charter school except (a) under the Prop. 39 process, and/or (b) for conversion charters.

Facilities

Prop. 51

Prop. 51 Overview

- Under Prop. 51, \$500 million was provided for the Charter School Facilities Program
- Permits a charter school to apply for funding for new construction and/or rehabilitation projects of district-owned facilities that are at least 15 years old
- 17 Oakland applicants -> 9 Oakland schools are preliminary recipients
- Next step: Negotiate long-term Facility Use Agreements with recipients who still intend on pursuing their Prop. 51 award

Prop. 51 Recipients

Charter School	District Site	Modernization or New Construction?
Aspire Berkley Maynard	Golden Gate Campus	Modernization
East Bay Innovation Academy	Marshall Campus	Both
Education for Change - Lazear	Lazear Campus	Both
Education for Change - Achieve	Hawthorne Campus	Modernization
KIPP Bridge	Lafayette Campus	Modernization
Lodestar - Lighthouse	King Estates Complex	Both
Leadership Public Schools R&D	Castlemont	Both
Urban Montessori Charter	Sherman Campus	Both
Yu Ming	Golden Gate CDC Campus	Both

Prop. 51 Considerations

- Longer-term lease duration (e.g., 40 years) provides continuity for schools/families, but may not align with Blueprint/asset management plan and limits flexibility
- Reduces annual administrative burden of Prop. 39 agreements
- Improves the condition of District facilities, though improvements may be outdated when the long-term lease agreement expires
- Note: if the charter school closes, the site must first be offered to another charter school

Facilities

Prop. 39

Prop. 39 Overview

- Annual process: entitles charter schools to occupy District sites for one school year
- Charter school must be allocated space that is “reasonably equivalent” to space at comparison schools
- Fees: per square foot, plus proportional utilities and custodial fees
- 11 applicants for 2019-20, down from 17 applicants in prior year
- Preliminary offers due to schools on February 1, Final offers due to schools on April 1

Prop. 39 Fee Historical Trends

- The rate per square foot changes from year to year as it is based on OUSD's projected budget divided by the cost of facilities and operations.

Fiscal Year	2014-15	2015-16	2016-17	2017-18	2018-19
Rate/Sq. Ft	\$4.36	\$3.80	\$4.73	\$4.74	\$3.85
Change	-	-\$0.56	\$0.93	\$0.01	-\$0.89

Prop. 39 Offers Accepted for 2018-19

Charter School	District Site(s)
Achieve Academy	Hawthorne Campus
American Indian Public Charter II	Roosevelt Campus
American Indian Public High	Lakeview Campus
Cox Academy	Cox Campus
East Bay Innovation Academy	Marshall Campus
Francophone Charter of Oakland	Toler Heights & Howard Campuses

Prop. 39 Considerations

- Annual process that leads to uncertainty each year in which district sites will be affected
- Does not satisfy long-term programmatic needs
- Uniform but restrictive facilities use agreements
- Per square foot rate fluctuates and is determined by a state-mandated calculation
- Implementation of sharing arrangements with district schools is complicated

Facilities

In-Lieu of Prop. 39/Long-Term

In Lieu of Prop. 39/Long-Term Overview

- The District has historically negotiated in lieu of Prop. 39/long-term agreements for some charter schools
- The terms and durations of these agreements have varied
- Rate structure for recent agreements charges a higher rate for out-of-district students attending charters
- Currently, 8 schools have long-term agreements

Current In-Lieu of/Long-Term Agreements

Charter School	District Site
Aspire Berkley Maynard	Golden Gate Campus
Bay Area Technology School	King Estates Complex
Community School for Creative Education	2111 International Blvd
KIPP Bridge	Lafayette Campus
Lazear Academy	Lazear Campus
Oakland Military Institute	Longfellow Campus
Roses in Concrete	John Swett/Tilden
Urban Montessori	Sherman Campus

In-Lieu of/Long Term Considerations

- Lease duration is longer-term but flexible, provides continuity for schools/families and can be designed to fit into Blueprint/asset management plan
- Flexibility with lease terms of the agreement relative to Prop. 39
- Lack of uniformity across terms of current lease agreements, but could be resolved going forward
- Reduces administrative burden of annual Prop. 39 requests
- Can allow for rent credits for capital improvements to address programmatic needs
- Can be supportive of high-quality charters who serve diverse populations

Board Questions & Comments



Potential Criteria for Long Term Charter Leases

Goals of Developing Criteria

- Promote community of schools:
 - Support high-quality charter schools that are serving diverse populations (reflective of OUSD) well
 - Support schools that align with Citywide Plan
- Promote transparency and uniformity around which schools are eligible and/or prioritized for long-term leases
- Incentivize under-performing charter schools to improve and/or come into alignment with Citywide Plan

Potential Criteria for Long Term Charter Leases

1	Administrative Factors	<ul style="list-style-type: none">● Priority for district-authorized schools● Priority for OUSD SELPA participation
2	Student Demographics	<ul style="list-style-type: none">● Higher % of in-district students● Reflective of OUSD: % of English Learners, students with IEPs, low-income students
3	Student Performance & Growth	<ul style="list-style-type: none">● Strong subgroup performance● Positive trajectory of performance
4	Governance/Facilities History	<ul style="list-style-type: none">● No or few notices of concern● Strong fiscal health● Efficient use of facilities in the past
5	Alignment with the Citywide Plan	<ul style="list-style-type: none">● Unique, high-demand programming● Stable enrollment (historical and planned)● Proximity to optimal location (Citywide Map)

Next Steps for Developing Criteria

Action(s)	Timeline
<ul style="list-style-type: none">● Get feedback from Board on criteria	December 5 Board Meeting
<ul style="list-style-type: none">● Gather additional stakeholder feedback● Refine criteria● Develop proposal for incorporating criteria into decision-making	December - February
<ul style="list-style-type: none">● Bring proposal for Board approval	March 13 Board Meeting

Board Questions & Public Comment



Asset Management Timeline

Asset Management BP 7350

Guiding Principle: The physical assets of the Oakland Unified School District shall be managed and maintained as a system to provide safe, secure, healthy, and technologically ready learning environments for students in Oakland's publicly funded schools in alignment with the District's Strategic Plan. To support the District's educational and operational functions, the District shall also use its properties to realize unrestricted revenue to support programs and services for District students.

Key Sections of the Policy:

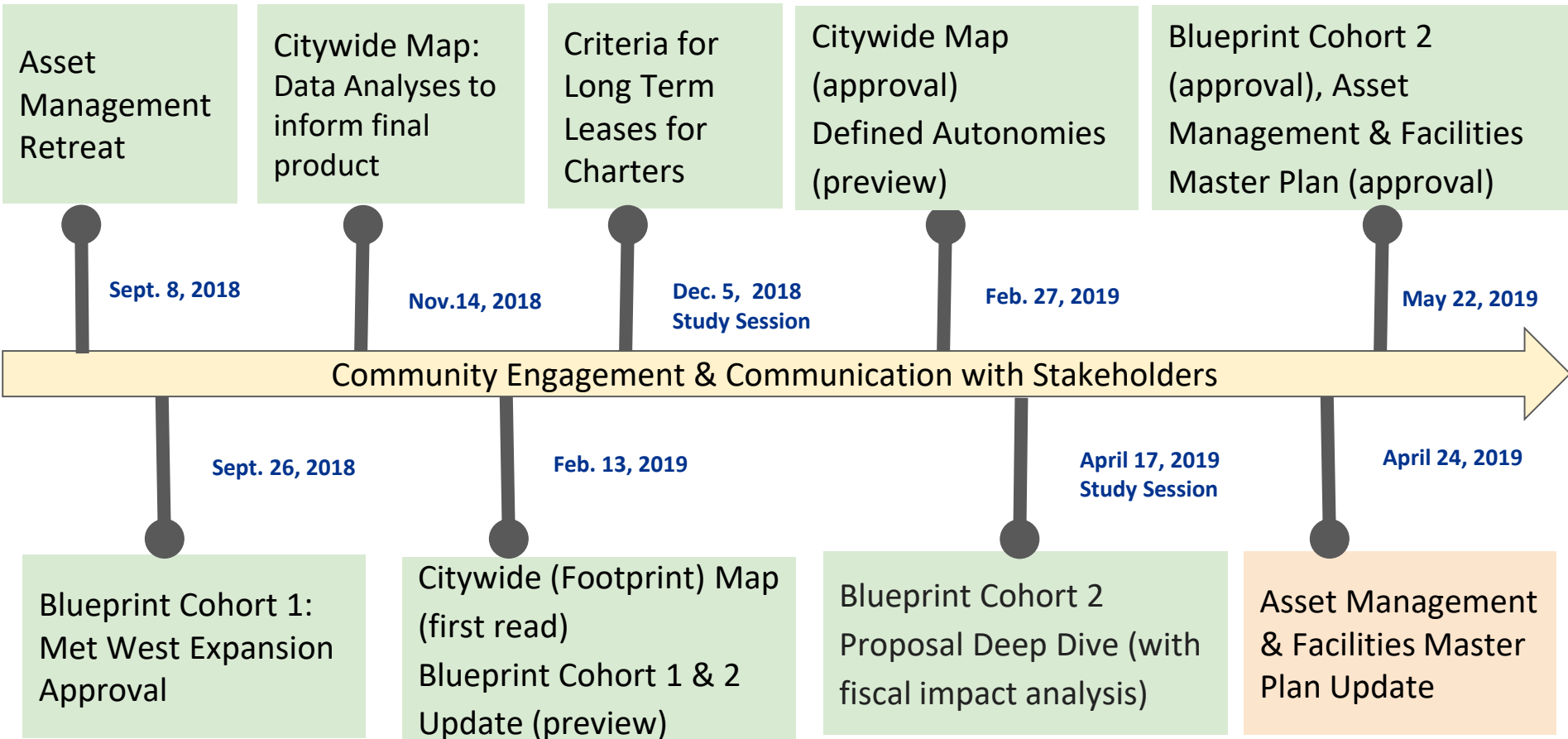
III. Considerations for Use of Properties

V. Using District Properties to Generate Unrestricted Revenues to Support Services and Programs for Student

Asset Management RFPs

Request for Proposal	Purpose	Timeline
Facilitate a 7/11 Committee and gather community input on ideas for surplus property	To review OUSD properties and make recommendations on what can be declared surplus	<ul style="list-style-type: none">-Post by Dec 21-Proposals to be submitted in Jan.-Review proposals and propose a contract in Feb.-Start Committee in March
Complete an updated Facilities Master Plan	To complete an updated Facilities Master Plan using the 2012 Facilities Master Plan, the 2014 Asset Management Plan, the Blueprint Facilities Data	<ul style="list-style-type: none">-Post by Dec 21-Proposals to be submitted in Jan.-Review proposals and propose a contract in Feb.-Finalize Facilities Master Plan in June

Timeline of Key Board Engagements for the Citywide Plan



Board Questions & Public Comment



: iam OUSD



**OAKLAND UNIFIED
SCHOOL DISTRICT**
Community Schools, Thriving Students

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Appendix

Prop. 51 Applicants

1. American Indian Public Charter High School
2. Aspire Berkley Maynard*
3. Aspire College Academy
4. East Bay Innovation Academy*
5. Education for Change - Lazear*
6. Education for Change - Achieve
7. Education for Change - Cox
8. Envision
9. KIPP Bridge
10. Leadership Public School R&D*
11. Learning Without Limits
12. Oakland School for the Arts
13. Oakland Unity High School
14. Yu Ming*
15. Lodestar - Lighthouse Community Schools*
16. Roses in Concrete*
17. Urban Montessori*

** Schools that applied for both rehabilitation and new construction projects*

Potential Options for Surplus Property

Requirements	Sale	Lease (>30 days)	Joint Use w/ New Construction	Exchange
7-11 Committee?	Yes	Yes	No	No
2/3rds vote of Board?	Yes	Yes, if purchase option	No	Yes
Offer to certain public/ gov't agencies 1st?	Yes	Yes (shorter list)	No	No
Highest bidder?	Yes	Yes	No	No
Proceed use?	Capital program or Loan Payback	Capital program or Loan Payback <u>if purchase option</u> , otherwise flexible	Depends on structure	Depends on structure